Bill Power - *by Studio 848, Inc.*

Bill Power© is Time & Billing software for popular infomation management systems, including Microsoft *Outlook*™.and *Exchange*™.

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Entering Task Data In Outlook

Bill Power loads only those Calendar, Task, and Journal Entries that have **Dates** assigned to them, and are **within** the **Date Range** set in the Bill Power Main View. Refer to entering data in *Outlook* for the complete list of fields Bill Power loads from Outlook.

Tasks are loaded into Bill Power based either on their **Due Date**, **Start Date**, or **Completed Date,** depending on Bill Power Loading Tasks Options .

Bill Power also calculates Task duration based on either **Actual Work** or **Total Work**, depending on Bill Power Loading Tasks Options .

Peer to Peer Networks

Bill Power and *Outlook* can be used for work group Time & Billing over peer to peer networks by adding a User **Profile** for each networked user.

To add **User Profiles** in Windows:

* Open the Windows **Control Panel**.
* Select **Mail**.
* Select **Show Profiles**.
* Add a **Profile** for each networked user.
    * Setup the Profile's **Personal Folders** to be the networked User's Outlook **Personal Folders**.

Set *Outlook* **Options** (**Startup** Settings) to **prompt** for a Profile to be used. This in turn allows you to select a Profile to be used by Bill Power.

Uninstalling Bill Power

To uninstall (remove) Bill Power from your computer, use the **Add/Remove Programs** utility in the Windows **Control Panel**. Select Bill Power from the list box, and remove the program.

Emailing Data

Billing data can be saved into files from Bill Power, and sent as email attachments, as follows:

- **Text Files** - Billing data as displayed by Bill Power can be **exported** to **text files** (see Exporting Data).
- **Bill Power Viewer** - Formatted billing data as displayed in the Bill Power **Viewer** can be **saved** in a **binary file**.(see Bill Power Viewer).

Exporting Data From Bill Power

Data can be exported from Bill Power to **text files** in various formats, for use with email, ***QuickBooks,*** spreadsheets, and databases.

You can see the **export information** for a particular **field** in Bill Power by clicking its **Column Header** in the Main View **Grid**, and viewing the pop up menu.

Set the Export data **format** using Bill Power Options

Exporting in Print Format (Email Bills)

Billing data as displayed in the Bill Power **Print Preview** can be **exported** to **text files** using the **Print Format** export option. Tabs are used to separate colums of data in tables.

This format is useful for sending billing data as **email** attachments.

The **column titles** for the fields displayed in the Bill Power Main View are also used in the export files.

The default **file extension** of ***.txt** is used.

Exporting to Spreadsheets and Databases

All data displayed by Bill Power can be exported to text files in tab delimited format; this is the **General** export format. These files can be easily imported into spreadsheets and databases.

The **column titles** for the fields displayed in the Bill Power Main View are also used in the export files.

The default **file extension** of ***.txt** is used.

Exporting to QuickBooks Import Files

The default **file extension** for *QuickBooks* import files (***.iif**) is used.

The data are imported into the *QuickBooks* **Item List** and **Customer;Job List**. Easily create a new **Invoice** in *QuickBooks* using this data by selecting the Items and Customers with drop down **lists** on the *QuickBooks* Invoice **form**.

Time entry data from Bill Power (Appointments, Journal Entries, Tasks) are exported using the *QuickBooks* **Item List** import format (**INVITEM**). The following fields are exported (using *QuickBooks* field names):

* **INVITEMTYPE** - Item type - Service Item (**SERV**) is used.
* **ACCT** - Account - **Accounts Receivable** is exported.
* **NAME** - This field must be unique for import into *QuickBooks.* The entry's **Date** concatenated with a **random number** is used for this field.
* **DESC** - Description - The entry's **Date** is concatenated with its **Subject** field and exported.
* **PRICE -** Rate **-** The **Billing Subtotal** is exported.

Contact data from Bill Power are exported using the *QuickBooks* **Customer;Job List** import format (**CUST**). The following fields are exported (using *QuickBooks* field names):

* **NAME - Full Name** is used.
* **COMPANYNAME - Company Name.**
* **BADDR1 - BADDR5 - Billing Address** lines 1 - 5**.**

Using Public Folders and Microsoft Exchange

You can use **Public folders** and Microsoft ***Exchange***™ to share information among networked *Outlook*™. users. **Bill Power© Plus!** will load, display, and summarize data from these Public Folders. This is a powerful combination for workgroup level Time & Billing.

For example, a public folder can be created for each member of a workgroup. Each of these public folders can contain Calendar, Contact, Journal, and Task subfolders for a specific workgroup member. Categories can then be used to track projects among workers.

Bill Power© creates summaries of the data for each *Outlook*™. folder, and for all of the folder's subfolders. **Subfolder summaries** consolidate all subfolder data and, when used with public folders, allow workgroup level Time & Billing.

For more information regarding public folders and *Exchange*™, refer to *Outlook*™ online **Help**.

Bill Power vs Bill Power Plus!

Bill Power© loads data from **only** the **default** Calendar, Contact, Task, and Journal Folders in *Outlook*™. This is sufficient for those who use Outlook™ as-is, and do not add any folders for storing time and billing data.

Bill Power© Plus! loads and displays data from **all** Outlook **folders** and subfolders that contain Appointments, Contacts, Journal Items, or Tasks - including **Public Folders** connected using Microsoft ***Exchange***™. This allows data from networked Outlook users to be included in time and billing data.

Demo Data for Outlook

A demo data file is available for download from the Studio 848, Inc. Web site. The file can be imported directly into *Outlook*™. It contains real data showing how to use Bill Power© with Outlook™.

This is a great way to learn how to use Bill Power© quickly. Be sure to stop by our web site and check it out (see **Contents** for Studio 848, Inc. **contact** information.).

Invoice Numbers

Invoice numbers can be entered in the **Header** or **Footer** of the Invoice.

See Bill Power Options for specific instructions on Headers and Footers.

Cover Pages

Customize the Cover Page of your Bills by setting preferences in Bill Power Options

Text **font** and **alignment** can be used to create high quality Cover Pages or **Letter Head**, eliminating the need for pre-printed Stationary.

By The Hour: One or More Hourly Rates

Bill Power assigns Hourly Rates for Calendar, Task, or Journal Entries as described in Entering Hourly Rate Data in *Outlook* .

Using Contacts to store Hourly Rates and relating them to Entries via Categories allows billing many different Entries at the same Hourly Rate, without having to enter the Hourly Rate for each and every Entry.   More than one Hourly Rate can be used for Entries in the same Project simply by using a different Category and Contact for each Hourly Rate.

Hourly Rate Billing

- **Add** a **Category** for each Hourly Rate.
- Assign the Contact to its corresponding Hourly Rate **Category**.
  - **Add** a **Contact** for each Hourly Rate.
  - Enter the **Hourly Rate** in the Contact **Billing Information** Field.
- **Add** Task, Calendar, and Journal **Entries** as needed.
  - Set the **Date** and **Duration** for the Entry
  - **Assign** the Entry to the corresponding Hourly Rate **Category**.

Envelopes and Labels

Bill Power accomodates printing Contact information (Full Name, Company, and Mailing Address) on **Envelopes** and **Labels** .   This is done for the currently selected Category or Contact in the Main View.

This feature can be used to address envelopes or packages for mailing, or identification.

Envelopes with cut-out **address windows** can be used by designing a **Cover Page** layout such that Contact Information is printed in the window.

See Bill Power Options for specific instructions.

Fixed Fee Billing

Use the **Billing Information** field of a Calendar, Journal, or Task **Entry** to enter Fixed Fees.

Refer to Entering Fixed Fee Data in *Outlook* for formatting details.

Fixed Fees

* **Add** a Calendar, Journal, or Task Entry for the Fixed Fee Bill.
    * Enter the Fee in the Entry's **Billing Information** field.
    * Set the **Date** for the Entry.
    * **Assign** the Entry to any applicable **Category**.

Recurring Billing: Weekly, Monthly, etc

Use a Recurring Task or Appointment to bill periodically for a Service.

Refer to Entering Billing Data in *Outlook* for formatting details.

Recurring Billing

* **Add** a Task or Calendar **Entry** for the Recurring Bill.
    * Enter the Billing data in the Entry’s **Billing Information** field.
    * Set the **Date** and **Recurrence Pattern** for the Entry (daily, weekly, monthly, etc.).
    * **Assign** the Entry to any applicable **Category**.

Cost Billing

Use the **Billing Information** field of a Calendar, Journal, or Task **Entry** to enter Costs. *Bill Power* generates a Costs subtotal, to segregate them from Fees and Payments.

Refer to Entering Cost Data in *Outlook* for formatting details.

Costs

* **Add** a Calendar, Journal, or Task Entry for the Cost Bill.
    * Enter the Cost in the Entry's **Billing Information** field.
    * Set the **Date** for the Entry.
    * **Assign** the Entry to any applicable **Category**.

Payments and Accounts

Use the **Billing Information** field of a Calendar, Journal, or Task **Entry** to enter a Client Payment. Use the **Contact Account** field to enter Account data. *Bill Power* generates a Payments subtotal for Entries, to segregate them from Fees and Costs.

Refer to Entering Payment Data in *Outlook* and Entering Account Data In Outlook forformatting details.

Payments

* **Add** a Calendar, Journal, or Task Entry for the Payment.
  * Enter the Payment in the Entry's **Billing Information** field.
  * Set the **Date** for the Entry
  * **Assign** the Entry to any applicable **Category**.

Accounts

* **Add** a **Contact** for the Client
  * Enter the Account data in the Contact **Account** field.

Loading Data Into Bill Power

Bill Power creates loads data directly from your Calendar. Use the **Main View** to Load (or reload) data into Bill Power.

NOTE: Bill Power loads only those Calendar, Task, and Journal Entries that have **Dates** assigned to them, and are **within** the **Date Range** set in the Main View.. Refer to entering data in *Outlook* for the complete list of fields Bill Power loads from Outlook.

Date Range:

* Set the **Start Date** and **End Date** of interest:
  * Click on the small Toolbar button (marked with a '**v**') next to the **Start** or **End** Date, and use the drop down **Calendar** to set the date.
  * Click on **OK** to accept, or **Cancel** to void the selections.

Loading (and Reloading) Data:

* Click on the **Load** button on the Main View Toolbar to load or reload data.
* **NOTE**: Be sure to **Load** to get the most **current** data from *Outlook*.

Restricting Loaded Categories:

* Select the **Categories** to be loaded in the Bill Power **Main View**:
  * Click on the **Categories** button on the Toolbar, which displays the Select Categories dialog box.
  * Either click on the Load **All** Categories radio button, or
  * Click on the Load **Specific** Categories radio button:
    * Select specific Categories from the **List** to be loaded.
    * To reload Categories List from which to chose, click on the **Reload** button.
  * Click on **OK** to accept, or **Cancel** to void the selections.

Restricting Loaded Folders:

* Configure folders in Outlook by **connecting** and disconnecting **Public folders**, and by **adding** or removing **Personal folders**.
* Create Windows **User Profiles** for **viewing** various **Outlook folder configurations**.
  * Select the My Computer Windows desktop Icon.
  * Select the Control Panel
  * Select Mail, or Mail and Fax
  * Show Profiles
  * Add User Profiles as necessary
    * Set the Profile's Personal Folders file (*.pst) accordingly.
* Set **Outlook Options** (Startup Settings) to **prompt** for a **Profile** at **startup**.

Entering Account Data In Outlook

Outlook **Contact** Entries have an **Account** Field. Bill Power uses data in this field as the **Account Balance** for that Contact. This is an easy way to track Client Accounts.

NOTE: The **Account** field for an *Outlook* **Contact** can be found as follows:

* **Open** the Contact for editing.
* Click on the **All Fields** tab.
* In the **Select From** drop down list, select **All Contact Fields**. All Contact data fields will then be displayed.
* One of the fields displayed is **Account**.

Listed below is the **Account** data field **format** required by Bill Power. Account data that does not follow these formats will not be used by Bill Power.

Account:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.
* If the number is **greater than 0 (positive)**, it is assumed to be money **owed** by the Client.
* If the number is **less than 0 (negative)**, or is in **parentheses ()** , it is assumed to be money **paid** by the Client.

Entering Data In Outlook

Bill Power retrieves data from fields in Outlook **Calendar**, **Tasks**, **Journal**, and **Contacts** entries. Schedule and record your **time** using Outlook Calendar, Tasks, and Journal entries. Use Contact entries to store **Client** information and Hourly Rate data.

For more information regarding data entry, refer to Outlook online **Help**.

NOTE: Bill Power loads only those Outlook Calendar, Task, and Journal Entries that have **Dates** assigned to them.

Listed below are **all** of the **data** fields loaded from Outlook into Bill Power:

Calendar (Appointments)

* **Start Time** and **End Time** for duration.
* **Subject**.
* **Notes**..
* **Required Attendees** .
* **Billing Information** for Payments, Costs, Fixed Fees, or Hourly Rate.
* **Categories** to relate *Outlook* entries to each other.
* **Mileage**.

Journal

* **Start** for Start Time
* **Duration** for Entry duration
* **Subject**.
* **Notes**.
* **Entry Type**.
* **Contacts** .
* **Billing Information** for Payments, Costs, Fixed Fees, or Hourly Rate.
* **Categories** to relate *Outlook* entries to each other.
* **Mileage**.

Tasks

* **Due Date** (set date to use for loading in Bill PowerOptions).
* **Start Date**.
* **End Date**
* **Actual Work**. (set work to use for duration in Bill PowerOptions).
* **Total Work**.
* **% Done**.
* **Priority** (0=Low, 1=Medium, 2=High).
* **Subject**.
* **Notes** .
* **Contacts**.
* **Billing Information** for Payments, Costs, Fixed Fees, or Hourly Rate.
* **Categories** to relate Outlook entries to each other.
* **Mileage**.
* **Hours Per Day, Hours Per Week** (set these using *Outlook* **Options)**.

Contacts (Clients)

* **Full Name**
* **Mailing Address**
* **Company**
* **Account** for Client Account Balance
* **Billing Information** for Hourly Rate.
* **Categories** to relate Outlook entries to each other.
* **Department**.
* **Office**.

* **Mileage**.

Entering Houly Rate, Fixed Fee, Cost, and Payment Data in Outlook

Outlook Calendar, Task, Journal, and Contact Entries all have a **Billing Information** data field. *Bill Power* uses the data in this field to calculate **Fixed Fee**, **Hourly Rate**, **Cost**, and/or **Payment** for the Entry.

How Bill Power Assigns Hourly Rates to Entries

Bill Power assigns Hourly Rates to Entries as follows:

* The **Entry's** Billing Information is **first** searched for a valid Hourly Rate.
* If no Hourly Rate is found, Bill Power will then search for a **Contact,** related to the Entry by the entry's **Contacts** field**,** containing valid Hourly Rate data in its Billing Information field.
* If no Hourly Rate is found, Bill Power will then search for a **Contact,** related to the Entry by the Entry's **Categories** field,. containing valid Hourly Rate data in its Billing Information field

Using **Categories** to relate Entries to Contacts allows you to use the same Hourly Rate for many different Outlook Entries, simply by grouping them by Category, relating a Contact to the same category, and entering the Hourly Rate in the Contact Billing Information data field.

Finding the Billing Information field for an Outlook Contact

The **Billing Information** field for an *Outlook* **Contact** can be found as follows:

* **Open** the Contact for editing.
* Click on the **All Fields** tab.
* In the **Select From** drop down list, select **All Contact Fields**. All Contact data fields will then be displayed.
* One of the fields displayed is **Billing Information**.

Billing Information Field Formats

Listed below are the **Billing Information** data field **formats** required by *Bill Power*. Billing Information data that does not follow these formats will not be used by *Bill Power*.

Fixed Fees:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.
* If the number is **greater than 0 (positive)**, it is assumed to be a **Fixed Fee**.
* For example, a **Fixed Fee** of $19.00 may be entered as follows:
  * $19.00, or 19.00, or 19

Payments:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.
* If the number is **less than 0 (negative)**, or is in **parentheses ()** , it is assumed to be a **Payment** from a Client.
* For example, a **Payment** of $19.00 may be entered as follows:
  * - $19.00, or -19.00, or -19, or (19)

Hourly Rates:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.
* If the field also contains the **Hourly Rate Key** (default value of '**h**', case insensitive), the number is assumed to be an **Hourly Rate**. Change the Hourly Rate Key using Bill Power Options .
* For example, an **Hourly Rate** of $19.00 per Hour may be entered as follows:
  * $19.00 per hour, or 19.00 / hr, or 19/h, or 19.00 H

Costs:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.
* If the field also contains the **Cost Key** (default value of '**cost**', case insensitive), the number is assumed to be a **Cost**. Change the Cost Key using Bill Power Options .
* For example, a **Cost** of $19.00 may be entered as follows:
  * $19.00 cost, or 19.00 COST, or 19 Cost

Entering Mileage Data in Outlook

Outlook Calendar, Task, Journal, and Entries all have a **Mileage** data field. Bill Power uses the data in this field as **mileage** (miles) for the entry.

Outlook Contacts also have a **Mileage** data field. Bill Power uses the data in this field to calculate the **Mileage Rate** ($ per mile) to be used for billable entries that are **related** to the Contact.

Bill Power adds mileage costs to the **Costs** total for a billable entry.

How Bill Power Assigns Mileage Rates to Entries

Bill Power assigns Mileage Rates to Entries as follows:

* Bill Power will search for a **Contact,** related to the Entry by the entry's **Contacts** field**,** containing valid Mileage Rate data in its Mileage field.
* If no valid Mileage Rate is found, Bill Power will then search for a **Contact,** related to the Entry by the Entry's **Categories** field,. containing valid Mileage Rate data in its Mileage field.

Finding the Mileage field for an Outlook Contact

The **Mileage** field for an *Outlook* **Contact** can be found as follows:

* **Open** the Contact for editing.
* Click on the **All Fields** tab.
* In the **Select From** drop down list, select **All Contact Fields**. All Contact data fields will then be displayed.
* One of the fields displayed is **Mileage**.

Mileage Field Formats

Listed below are the **Mileage** data field **formats** required by *Bill Power*. Mileage data that does not follow these formats will not be used by *Bill Power*.

Mileage:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.

Mileage Rates:

* Only the **first number** entered in the field is assumed to be valid; all others are ignored.
* The field must also contain a **Mileage Rate Key** (default value of '**m**', case insensitive). Change the Mileage Rate Key using Bill Power Options .
* For example, an **Mileage Rate** of $0.33 per Mile may be entered as follows:
  * $0.33 per mile, or 0.33 / mile, or 0.33/m, or 0.33 M

Relating Billable Entries to Contacts

Billable entries (Appointments, Tasks, and Journal entries) can be **related** to Contacts by using:

1) the entry's **Contacts** field (the **Required Attendees** field for Appointments). Bill Power uses the entry's Contacts to search for Contacts with the same names.

2) the entry's **Categories** field. Bill Power uses the entry's Categories to search for Contacts that are related to the same Categories.

These relationships can be used to group entries together by project (Category), or Contact.

IMPORTANT - Hourly Rate Assignment:

* Bill Power also uses these entry-to-Contact **relationships** to assign **hourly rates** to groups of entries from the data in a **Contact's Billing Information** field. Bill Power **first** tries to assign from Contacts related to the entry's **Contacts** field, and then tries to assign from Contacts related to the entry's **Categories** field.
* Bill Power assigns billing rates from Contacts to billable entries in the following **order** (this order of assignment allows you to override hourly rates by using Contacts located 'closer' to the billable entries in question):
    1) from Contacts in folders at the same level as the billable entry folder ('**sibling**' folders),
    2) from Contacts in **parent** folders in the same folder heirarchy, and
    3) from Contacts in folders **anywhere** in the Outlook folder hierarchy.

Viewing Data in Bill Power

Bill Power presents two views of data: the **Main View**, and Bill Power **Viewer**.

Main View

The **Main View** uses a hierarchy of **Folders** (on the left), and **Entry Groups** coupled with a **Grid** (on the right) to organize and view Entries from your Calendar.

General:

* To change the size of either side of the window, **drag** the **bar** that separates the two sides.
* Use the horizontal and vertical **Scroll Bars** for navigation.

Folders:

* Click the **plus signs** (+) to display more folders.
* To quickly open a folder and display the folders inside, **double-click** the folder on the left side of the window.

Subfolder Summaries:

* Subfolder Summaries consolidate data from **all** of a folder's subfolders.

Entry Groups:

* Entries are grouped by the following fields, to accomodate a wide range of reporting options:
  * **Category**
  * **Contact**
  * **Company**
  * **Department**
  * **Office**.

Grid: Viewing and Formatting Tables of Data

Use the **Grid** to view data by rows and columns, and for **formatting Printed Tables.**

* Change the **Width** of the **columns** by dragging the Column Header sides with the Mouse.
* **Click** on the Grid **Column Headers** to format the data in the columns, using a Popup Menu.
  * **Sort** the data in the Column in Ascending or Descending order.
  * **Show** or **hide** the Column of data in the **Printed Table**.
  * Change the **Column Title**.
  * Select the **format** for **Dates**, either **Date,** or **Date and Time**.
  * **Export** information, including:
    * If the field **is** or **is not** Exported
    * Export **Label**.
    * Export **Format**.

Bill Power Viewer

The Bill Power **Viewer** displays a preview of the data currently displayed in the Main View, exactly as it will be printed (see Bill Power Viewer)

Bill Power Viewer - Viewing, Printing, Faxing, and Saving Bills

The Bill Power **Viewer** displays a preview of the data currently displayed in the Bill Power Main View, exactly as it will be printed.   To display the Viewer from Bill Power, click on the **Preview** Toolbar button in the Main View.

The Bill Power Viewer is also available as a stand alone program, separate from Bill Power, and can be downloaded from the Studio 848, Inc. web site..

Using the Viewer

* Use the **Zoom** Toolbar buttons to increase or decrease the view magnification.
* Use the **Page** Toolbar buttons to display the first, previous, next, or last page.
* Use the **Layout** Toolbar Button to select **portrait** or **landscape** orientation.
* Click on the **Print** Toolbar button to Print or **Fax** the current view.
* Use the horizontal and vertical **Scroll Bars** to navigate the view (the scroll bars are shown only if necessary).

Alternately, click and **drag** the preview to move it around the view.

* Click on the **Back** Toolbar button to return to the Bill Power **Main View**.

Printing and Faxing Bills

* Click on the **Print** Toolbar button to Print or **Fax** the current view.
  * Use the **Printer Name** to select a printer or fax.
  * **NOTE**:   To Fax the bill, select a **Fax** for the Printer Name.
  * Click on the **Properties** button to view or set printer properties.
  * Use **Print Range** to print All Pages, or just the currently displayed page.
  * Use **Copies** to select the number of copies to be printed.

Saving and Opening Viewer Files

Formatted billing data as displayed in the Bill Power **Viewer** can be **saved** in a **binary file**. The Bill Power Viewer is **required** to **open** and view these files. This allows formatted Invoices to be archived.

* Click on the **Save** Toolbar button to save the current Print Preview as a file.
  * Use the **Save As** dialog to select where to save the file.
  * If you haven't saved your file before, type a name for the file in the **File Name** box.
* Click on the **Open** Toolbar button to open a previously saved file for viewing.
  * Use the **Open** dialog box to find the file to open.

Emailing Bills

Bills created with Bill Power Viewer can be saved as binary files and sent as attachments to email messages. The Bill Power Viewer can be downloaded from the Studio 848, Inc. web site and used to view and print these bills.

Categories: Organizing Data In Outlook

Use Categories to **relate** *Outlook* Entries to each other, and **group** Entries together.   This is one of the most powerful features of *Outlook*.   All Outlook Entries have a **Categories** data field.

Bill Power loads and sorts *Outlook* Entries by Category, allowing Billing data to be viewed and printed on a per-Category basis.

Using Categories In Outlook

* Search *Outlook* **Help** for the word **Category**.
* Select the **Assign Items to a Category** topic.
  * The **Categories Supplied in Outlook** topic discusses how to use predefined Categories.
  * The **Create New Categories for Later Use** topic discusses how to add new Categories.
  * The **Assign an Item to a Category** topic discusses how to assign an Entry to a Category.

Project (Case) Categories

* Add a **Category** for the Project.
* **Add** new Calendar, Journal, or Task **Entries** as needed.
  * **Assign** the Entries to the Project **Category**.
* To relate the Project to a **Client**:
  * Add a **Contact** for the Client.
  * **Assign** the Contact to the Project **Category**.

Service Categories

* Add a **Category** for the Service.
* **Add** a Task or Calendar **Entry** for the Service.
  * **Assign** the Entry to the Service **Category**.
  * Enter the Billing data in the Entry's **Billing Information** field.
  * For a Recurring Service (weekly, monthly, etc), set the **Date** and **Recurrence Pattern** for the Entry.
* To relate the Service a **Client:**
  * Add a **Contact** for the Client.
  * Assign the **Contact** to the Service Category.

Hourly Rate Categories (Employees, Services)

* **Add** a new **Category** for the Hourly Rate:
  * Use a descriptive name for the Category, such as the Employee's **initials**, or the type of Billable Rate.
* Add a **new Contact** for the Hourly Rate:
  * **Assign** the Contact to the Hourly Rate **Category**.
  * Enter the Billing data in the Contact **Billing Information** field.
* To relate Calendar, Task, or Journal Entries to the **Employee**, **assign** the Entries to the Category.

Taxes

Bill Power allows you to add a percentage **Tax** to **Fees** and/or **Costs**, at different rates. Enter the rates using *Bill Power* **Options**.

Refer to Bill Power Options for formatting details.

Bill Power Options

Bill Power provides all of the formatting options necessary to create professional quality Invoices. Click the Toolbar **Options** button in the Main View or Print Preview to view Options and set preferences.

General Options

Main View Font

* Set this font in the **Print Options, Tables, Font**. Using the same font insures that what you see in the Main View is what you get in the Print Preview.

Taxes

* Enter Tax **Rates** (%) for **Fees** and **Costs**, ranging from 0% to 100%. Note that *Bill Power* supports **fractional** Tax rates (i.e. 8, 6.0, 5.50, and 10.75 are all valid rates).

Search Keys

* **Hourly Rate Key**. Enter the key (phrase) used to denote Hourly Rate in an entry's Billing Information field. The default is '**h**' (case insensitive).
* **Mileage Rate Key.** Enter the key (phrase) used to denote Mileage Rate in a Contact's Mileage field. The default is '**m**' (case insensitive).
* **Cost Key.** Enter the key (phrase) used to denote Cost in an entry's Billing Information field. The default is '**cost**' (case insensitive).

Export

* **Export Text File Format**. Select the format used for exporting data to text files.
    * **Print Format** - billing data as formatted for Print Preview.
    * **Spreadsheet -** tab delimited text files, can be imported into spreadsheets and databases.
    * **QuickBooks** - Import files.

Loading Tasks

* **Task Date Used For Loading:**. Select either **Due Date, Start Date, or Completed Date** to use for loading Tasks by date range.
* **Task Work Used For Hours:** Select either Actual Work or Total Work to use for duration.

Folder Labels

* Set the labels that Bill Power uses for displaying and printing various Folders. These labels can be changed to accomodate language translations, or specific formatting styles. The default labels are displayed for reference. Folders include:
    * Subfolder Summary
    * All Entries

Print Options - Formatting Bills

Layout

* **Orientation**: Select either **Portrait** (length ways) or **Landscape** (side ways). Landscape orientation is useful for displaying many Columns of data in tables.
* **Margins**: Use the drop down **lists** to set the top, bottom, left, and right Margins.
* **Itemized Table**:
    * Select to **print** the **Itemized** Table of Entries.
    * Select to print the **Summary** Table **before** the Itemized Table.
    * Select print the **Summary** Table **after** the Itemized Table.
* **Cover Page**:
    * Select to **print** a Cover Page.
    * Select to print **Today's Date** on the Cover Page.
    * Select to print the **Date Range (Billing Period)** on the Cover Page.
    * Select to print **Contact Information** (Full Name, Mailing Address) on the Cover Page.
    * Select to print the **Summary Table** on the Cover Page.
    * Select to start printing the **Itemized Table** on the **page following** the Cover Page. This is useful if the Cover Page is such that the Itemized Table would start printing to low on the page, and would look better starting on page following the Cover Page.

Tables Format

* **Font**: Click on the **Font** button to select the Font for all Tables.
* **Alignment**: Select either **left**, **center**, or **right** aligment for all Tables.
* **Grid Lines**: Select to include **vertical grid lines** in the Tables. This will make all rows and columns have borders.
* **Summary Table Label:** Set the label used for the Summary Table - defaults to (Summary).
* **Itemized Table Label:** Set the label used for the Itemized Table - defaults to (Itemized).
* **Column Formatting:** Set Column **title**, **width**, and **show** or **hide** in Print by using the <u>Grid in the Main View.</u>

Header and Footer

* **Font**: Click on the **Font** button to select the Font for the Header and Footer.
* **Header Text**: Use the **Text Boxes** to type in the text that will be printed on the **left**, **center**, and **right** of the Header.
* **Footer Text**: Use the **Text Box** to type in the text that will be printed in the **center** of the Footer. By default, the **Page Number** is printed on the **right**, and the **Date** is printed on the **left** of the Footer.

Cover Page

* **Editing Text:** Use the **Text Box** below the Toolbar to type in text you want to appear on the Cover Page. The Options dialog box can be **resized** to help viewing the Cover Page text.
* **Font**: Click on the Toolbar **Font** button to set the Font for the **currently selected text**. Note that **different** Fonts can be used for different sections of text.
* **Alignment**: Select **left**, **center**, or **right** alignment for the **currently selected text**. Note that **different** aligments can be used for different sections of text.

Envelope

* **Orientation**: Select either **Portrait** (length ways) or **Landscape** (side ways). This selection will depend on how Envelopes are fed into your Printer.
* **Margins**: Use the drop down **lists** to set the top and left Margins used for printing Contact Information (name, company, and address). This allows you to center the address on the Envelope, and will depend on how Envelopes are fed into your Printer.